

# IGS Grantee User Guide

March 2017

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# 1. IGS Connect System Requirements

The Arkansas IGS Connect system is designed for use by the vast majority of computer users with little or no changes to the computer environment. The requirements that are mentioned below are common computer elements that should be present on most machines.

## Operating System

IGS Connect is designed for both of the more common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and UNIX. Users accessing IGS Connect from a Macintosh environment are required to have MacOS 7.5 or higher. Windows users are required to have an operating system that is Windows XP or higher.

## Internet Connection

IGS Connect is a web site designed for access via the Internet. For purpose of accessing IGS Connect, minimum connection is by modem. For those using a modem, recommended connection speed is at least 33.6 kbps (kilobits per second). Internet connections "faster" than modem, i.e., cable, DSL, T1, wireless improve speed at which the system operates. In an office environment, there may already be an Internet connection, but if unsure, contact the network administrator.

## Web Browser

This system was designed to be compatible with common, up-to-date web browsers including: Internet Explorer V.7 and above, Firefox, Safari, and Opera.

## Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format, .pdf) documents. The IGS Connect system automatically generates grant documents in PDF format using information that is saved into various narrative and budget pages by the user. Using Adobe Acrobat Reader, you can view, print, or save PDF documents. Adobe Acrobat Reader can be downloaded at [www.adobe.com](http://www.adobe.com).

## Microsoft Word Viewer

IGS Connect has a combination of both Microsoft Word (.doc, .docx) and PDF documents. Microsoft Word increases IGS Connect's formatting options and reduces the amount of empty space on printed pages. If Microsoft Word is not installed on your computer, Microsoft Word Viewer is a free alternative program that will allow you to view, print and copy Microsoft Word documents. It is available for download at [www.microsoft.com](http://www.microsoft.com).

## 2. System Access

### Protecting Confidential/Sensitive Information

IGS policy requires that confidential/sensitive information be safeguarded. All attachments submitted via IGS Connect must not contain confidential/sensitive information. Before attachments are uploaded, sensitive information must be redacted; examples include social security numbers (even if it is only the last 4 digits of an SSN), items such as bank account numbers (generally found at the bottom of a check), credit card data, and/or any other confidential/sensitive data that is not required to support the grants-management process.

### Obtaining an IGS Connect Login

In order to access IGS Connect, the grantee (Authorized Official or Acting Authorized Official) must have an assigned login consisting of a username and password. There are two ways for a grantee to obtain a login:

1.) Registering as the initial **Authorized Official** of a new organization within the IGS Connect system

Or

2.) Being granted an **Acting Authorized Official** account by an established **Authorized Official** for a pre-existing organization within the IGS Connect system

#### **Authorized Official**

For a new user and their respective organization to be created within the IGS Connect system, the designated head of each organization will need to register and be assigned as the **Authorized Official** role. This person may request access to IGS Connect using the **New User?** link on the IGS Connect login page(see the **Login Page** section in this manual).

They will need to fill in the required profile information, then wait for an IGS Connect system administrator to activate the account and create their requested organization (or add them to a pre-existing organization); a confirmation e-mail will be sent to the provided email address once this has occurred.

#### **Other Users (Acting Authorized Officials)**

Once an organization's Authorized Official has access, the user can then add additional users to their organization under the **Acting Authorized Official** role.

#### **Authorized Official(s) responsibilities:**

- Adding users to their organization
- Activating, assigning, and deactivating users to/from their organization and related documents
- Completing and submitting relevant grant applications

## 3. Login Page

### Accessing IGS Connect

To access IGS Connect, enter [IGSConnect.Arkansas.gov](http://IGSConnect.Arkansas.gov) into the address bar of a supported web browser.

**Note:** IGS Connect does not save the username and password. This option *may* be available on your browser.

**DFA** Arkansas Department of Finance and Administration

**IGS CONNECT**  
Intergovernmental Services

System Login Portal

### Welcome to the IGS CONNECT System...

Welcome to the Online Grants Management System - IGS CONNECT

Because this is a new online management system, all organizations will need to register with the system. **Steps to Get Started:**

- The initial registration for your organization must be completed by an Authorized Official (AO) for the organization; e.g. Program Director
- Once the AO registers the organization, they will receive an email *Notification of Access Approval* from the online systems administrator
- From that point, the AO can designate access to your organizational account to other staff members as they see appropriate
- Once your organization is registered in the system, you can apply for grants and complete/submit reports

To visit our official website click the following link: <http://www.dfa.arkansas.gov/>

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### Bookmark/Favorites

IGS Connect may be bookmarked, or added, to the favorites menu

After accessing the IGS Connect Login page, on the Internet Explorer (IE) menu bar:

1. Select **Favorites**
2. Select **Add to Favorites**
3. Rename the site, if desired
4. Select **Add**

## Adding IGS Connect to List of Trusted Sites

To avoid various browser-related restrictions unnecessarily placed on IGS Connect, make the following changes to the web browser.

If using Internet Explorer, we recommend adding the IGS Connect Home page to the list of trusted sites as follows:

1. Select **Tools**
2. Select **Internet Options**
3. Select **Security**
4. Select **Trusted Sites**
5. Select **Sites**
6. In **Add this website to the zone:** enter: <https://IGSConnect.Arkansas.gov>
7. Select **Add**
8. Select **Close**
9. Select **OK**

## 4. My Home

The **My Home** page is the next page seen after logging into IGS Connect.

IGS Connect currently features two available tabs on the top of the screen – **My Home** and **My Applications**.

**View Available Proposals** does not appear on the **My Home** page unless a user and their organization meet the criteria to initiate an application that is being offered by IGS.

Likewise, when there are no active tasks to perform, **My Tasks** does not appear on the **My Home** page. There may be times when only **My Inbox** (e-mail/messages) appears on the Home page.

The screenshot shows the IGS Connect interface. At the top left is the DFA Arkansas Department of Finance and Administration logo. At the top right is the IGS CONNECT Intergovernmental Services logo. Below the logos are two tabs: 'My Home' (selected) and 'My Applications'. A navigation bar contains links for 'My Organization(s)', 'My Profile', and 'Logout', along with a 'SHOW HELP' button.

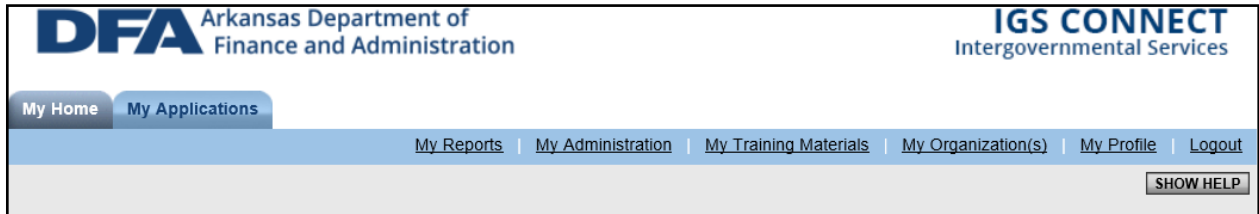
A welcome message box for 'Jesse' (Authorized Official) includes a 'Change My Picture' link. To the right, 'Instructions' are provided, including a 'SHOW HELP' button and a list of topics: 'Applying for an Opportunity', 'Using System Messages', 'Understanding your Tasks', and 'Managing your awarded grant'.

The main content area displays three sections:

- View Available Proposals:** A yellow arrow icon, the text 'View Available Proposals', and a 'VIEW OPPORTUNITIES' button. Below it, it states 'You have 1 opportunities available. Select the **View Opportunities** button below to see what is available to your organization.'
- My Inbox:** A yellow envelope icon, the text 'My Inbox', and an 'OPEN MY INBOX' button. Below it, it states 'You have 22 new messages. Select the **Open My Inbox** button below to open your system message inbox.'
- My Tasks:** A yellow checkmark icon, the text 'My Tasks', and an 'OPEN MY TASKS' button. Below it, it states 'You have 2 new tasks. You have 0 tasks that are critical. Select the **Open My Tasks** button below to view your active tasks.'

## Searching for Documents

The **My Applications** tab allows for searching documents in the system. This example will search for an application.



To view a list of all available system applications:

1. Select **My Applications**
2. Select **Search**

To filter the list by application type, name, person(user), status, organization, or fiscal year:

1. Select **My Applications**
2. Fill in the necessary information filters(any combination)
3. Select **Search**

From the resulting list of applications, select the one to view by clicking on the **Name** of the application

**My Applications**  
Use the search functionality below to find a specific Application.

Search Applications

Application Types: IGS Application FY2018 ▼

Application Name:

Person:

Status: -- Select -- ▼

Organization:

Year:

**SEARCH**

Export Results to: Screen ▼ Sort by: -- Select -- ▼

Number of Results **4**

Document Type	Organization	Name	Current Status	Year
IGS Application FY2018	<a href="#">Agate Test Org</a>	<a href="#">IGS-2018-Agate Test Org-00056</a>	Application Pre-Screening	2018
IGS Application FY2018	<a href="#">Agate Test Org</a>	<a href="#">IGS-2018-Agate Test Org-00057</a>	Application in Process	2018
IGS Application FY2018	<a href="#">Agate Test Org</a>	<a href="#">IGS-2018-Agate Test Org-00058</a>	Application Denied	2018
IGS Application FY2018	<a href="#">Agate Test Org</a>	<a href="#">IGS-2018-Agate Test Org-00059</a>	Application in Process	2018



## Viewing and Initiating Available Applications

The **View Available Proposals** section is visible when an application offered by IGS is open and actively accepting submissions.

It lists all available opportunities that you may currently apply for and submit to IGS for review. To initiate a new application, select **View Opportunities** (located under the **View Available Proposals** header) and then **Start an Application**.

The screenshot shows the top navigation bar with 'DFA Arkansas Department of Finance and Administration' on the left and 'IGS CONNECT Intergovernmental Services' on the right. Below the navigation bar are tabs for 'My Home' and 'My Applications', and links for 'My Organization(s)', 'My Profile', and 'Logout'. A 'SHOW HELP' button is also present. A welcome message for 'Jesse' is displayed, along with instructions for using the system. The main content area features a 'View Available Proposals' section with a yellow play button icon, indicating that 1 opportunity is available. A 'VIEW OPPORTUNITIES' button is highlighted with a red box.

The screenshot displays the details for an 'IGS Application 2017 for My Test Org'. The application is offered by the 'Office of Intergovernmental Services'. The availability dates are '09/13/2016-12/31/2017', and the application period is also '09/13/2016-12/31/2017'. The due date is '12/31/2017'. The description states: 'A detailed description of the application instance will be available here.' At the bottom, there are two buttons: 'START AN APPLICATION' (highlighted with a red box) and 'NOT INTERESTED'.

If you no longer wish to see a posted opportunity in your list, you may select **Not Interested** and it will be removed from your individual view.

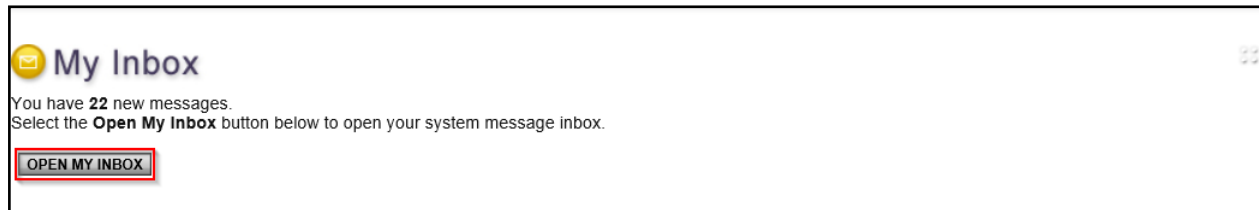
If, later on, you decide you would like to access that opportunity again, you can click **Reset My Opportunities** to re-display all available opportunities that have been marked as **Not Interested**.

## Accessing My Inbox (E-mail/System Messages)

Periodically, you may receive a message in the form of an e-mail and/or a system message from the IGS Connect system or an IGS staff member.

Messages sent as both a **System and Email Message** appear in both **My Inbox** (located on the **My Home** screen) as well as the mailbox of each e-mail address listed in each contact's **My Profile** page. Messages sent as a **System Message** will only appear inside of the **My Inbox** of the specified user accounts.

To access the contents of **My Inbox**, from the **My Home** screen select **Open My Inbox**.

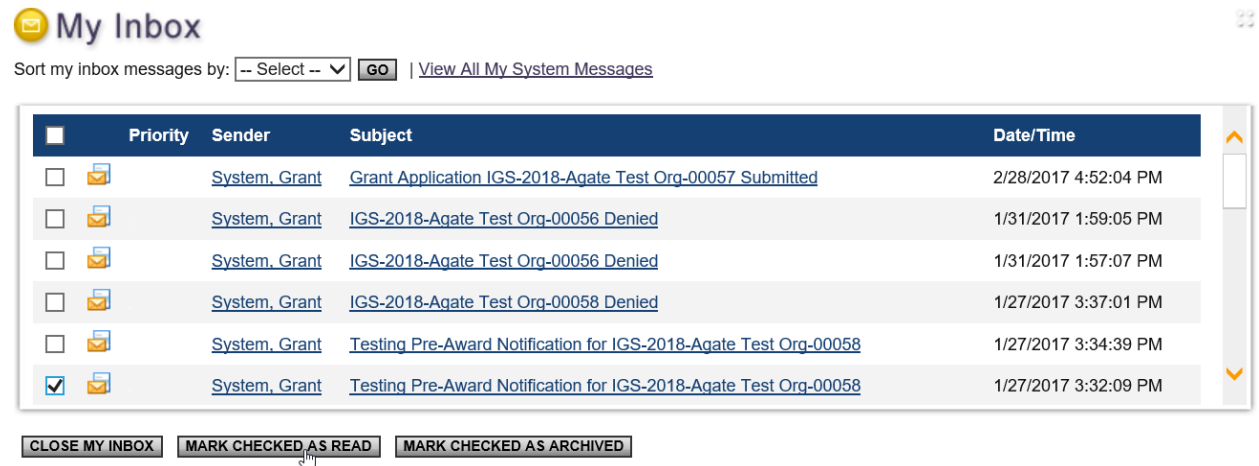


## Viewing E-mail/Messages

All new, unread system messages, if any, are displayed upon opening your **My Inbox**.

The following can be done in the Inbox:

- Sort messages by Priority, Sender, Subject, or Date/Time
- Select **View All System Messages** to see all messages going back to when system access was received
- View a message's priority status
- Select its subject link to view the message
- See date/time a message was sent
- Select a sender's name to reply to a message
- Check box at left of message to **Mark Checked As Read**



## Searching for E-mail/Messages

To search for a message, select **View All System Messages**. From the **My System Messages** page, enter a keyword and select **Search**. A list of messages that match the search criteria will display.

The following can also be done from this menu:

- Sort search results by Priority, Sender, Subject, Date/Time, or Status
- View all messages going back to when system access was received
- View a message’s priority status
- Select a sender’s name to reply to a message
- See date/time a message was sent

## Completing My Tasks (Active Tasks)

**My Tasks** appears on the **My Home** screen when there are tasks that require your attention. Some of the tasks may be critical (indicated by a **red Date Due**).

To access documents requiring action, select **Open My Tasks** and, in the **Name** column, click on the name of the document that you would like to view.

To access general information regarding the organization submitting the application, click on the name of the organization in the **Organization** column.

When there are no active tasks, the **My Tasks** section is will not display on the **My Home** screen.

**Note:** To search for and access all applications that you are assigned to but not currently able to see in **My Tasks**, see user guide section **Searching for Documents** in this manual.

The screenshot shows the 'My Tasks' section of the IGS Connect Admin interface. At the top, there is a 'My Tasks' header with a yellow checkmark icon. Below the header, there are controls for 'Export Results to' (set to 'Screen') and 'Sort by' (set to '-- Select --'), followed by a 'GO' button. The main content is a table with the following columns: Info, Document Type, Organization, Name, Current Status, Date Received, and Date Due. The table contains two rows of data. The first row has 'IGS Application FY2018' as the document type, 'Agate Test Org' as the organization, 'IGS-2018-Agate Test Org-00056' as the name, 'Application Pre-Screening' as the current status, '2/1/2017' as the date received, and '12/31/2016' as the date due. The second row has 'IGS Application FY2018' as the document type, 'Agate Test Org' as the organization, 'IGS-2018-Agate Test Org-00058' as the name, and '2/31/2017' as the date due. A tooltip is displayed over the 'Name' column of the second row, showing 'Project Title: Test Project Title 1'. At the bottom left of the table area, there is a 'CLOSE MY TASKS' button.

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	IGS Application FY2018	<a href="#">Agate Test Org</a>	<a href="#">IGS-2018-Agate Test Org-00056</a>	Application Pre-Screening	2/1/2017	12/31/2016
	IGS Application FY2018	<a href="#">Agate Test Org</a>	<a href="#">IGS-2018-Agate Test Org-00058</a>			2/31/2017

Project Title:  
Test Project Title 1

CLOSE MY TASKS

## 5. My Organization(s)

### Updating your Organization Profile

Upon being granted access to your new IGS Connect Authorized Official user account, one of the first things you will want to do is ensure your **My Organization(s)** profile is up-to-date.

This is important because much of the information from this profile can, and will, be automatically pulled into some application fields. If it is not correct, this can end with an application being submitted with incorrect information about your organization, or an application that cannot be submitted because a required **My Organization(s)** field is missing.

To update your **My Organization(s)** profile:

1. From any screen, select **My Organization(s)**
2. Update the necessary fields
3. Select **Save**

### Managing Organization Members

As an **Authorized Official**, you are permitted to create additional organization users("members") with a role of **Acting Authorized Official**. Users with the Authorized Official role would grant system access to other users that need to be able to complete and submit applications on your organization's behalf.

For the most part, the **Acting Authorized Official** role has the same level of system and document access as the **Authorized Official**. Notable exceptions to this are related to the inability for AAO users to create and manage accounts within the organization, as well as the inability to manually assign other users to existing applications; both of these tasks are reserved for the higher-level **Authorized Official** role.

To view all existing users within your organization:

1. From any page, select **My Organization(s)**
2. Select **Organization Members**

The screenshot shows the 'Organization Members' page for 'Agate Test Org'. The page includes a navigation bar with 'My Home', 'My Applications', 'My Organization(s)', 'My Profile', and 'Logout'. Below the navigation bar, there are 'SAVE' and 'SHOW HELP' buttons. The main content area is titled 'Organization - Agate Test Org' and includes instructions for adding, removing, or modifying organization members. There are three tabs: 'Organization Information', 'Organization Members' (which is selected and highlighted with a red box), and 'Organization Uploads'. Below the tabs, there is a section for 'Organization Members' with instructions for administrators. At the bottom, there is a table with columns for 'Person', 'Role', 'Active Dates', 'Active Documents', 'Assigned By', and 'Modified By'. The table contains two rows of data.

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> AAO_Jesse	Acting Authorized Official	9/20/2016	5	King, Jesse 9/20/2016	King, Jesse 1/27/2017
<input checked="" type="checkbox"/> AO_Mr_Jesse	Authorized Official	9/13/2016	5	King, Jesse 9/13/2016	King, Jesse 9/28/2016

To create a new user for your organization:

1. From any page, select **My Organization(s)**
2. Select **Organization Members**
3. Select **Add Members**

The screenshot shows the 'Add Members' page for the 'Agate Test Org'. At the top, there are navigation tabs for 'My Home' and 'My Applications'. On the right, there are links for 'My Organization(s)', 'My Profile', and 'Logout', along with 'SAVE' and 'SHOW HELP' buttons. Below this is a 'Back' button. The main heading is 'Organization - Agate Test Org'. Underneath, there are instructions and links for 'Organization Information', 'Organization Members', and 'Organization Uploads'. The 'Organization Members' section contains instructions for administrators and a list of steps: 1. To add a member, select 'Add Members'. 2. If a member has already added his/her information, you can search for the member. 3. If you need to add a member's information into the system, select 'New Member'. 4. For more detailed instructions, select the 'Show Help' button. Below the instructions are links for 'Current Members' and 'Add Members' (highlighted with a red box). A table with columns 'Person', 'Role', 'Active Dates', 'Active Documents', 'Assigned By', and 'Modified By' is visible. The table contains two entries: 'AAO\_Jesse' (Acting Authorized Official) and 'AO\_Mr\_Jesse' (Authorized Official). At the bottom, there are 'Sort By' and 'Results Per Page' dropdowns, and a 'GO' button.

4. Search for an existing user if you know this user is already part of a different, existing organization and simply needs access to your organization

**OR**

Select **New Member**

5. If choosing an existing user
  1. select the user(s) from your search results list
  2. Assign the appropriate role from the **Role** dropdown
  3. Provide the appropriate **Active/Inactive** dates for your organization access.
  4. Select **Save**.
  5. Repeat as necessary if you are unable to find all users with one search.

The screenshot shows the 'New Member' search process. At the top, there are navigation tabs for 'My Home' and 'My Applications'. On the right, there are links for 'My Organization(s)', 'My Profile', and 'Logout', along with 'SAVE' and 'SHOW HELP' buttons. Below this is a 'Back' button. The main heading is 'Organization - Agate Test Org'. Underneath, there are instructions and links for 'Organization Information', 'Organization Members', and 'Organization Uploads'. The 'Organization Members' section contains instructions for administrators and a list of steps: 1. To add a member to your organization, select 'Add Members'. 2. If a member has already added his/her information in the system, you can search for the member. 3. If you need to add a member's information into the system, select 'New Member'. 4. For more detailed instructions, select the 'Show Help' button. Below the instructions are links for 'Current Members' and 'Add Members'. A 'Person Search' section is visible with a search box containing 'jesse', a 'SEARCH' button, and a 'NEW MEMBER' button. Below the search section is a table with columns 'Person', 'Role', 'Active Dates', 'Active Documents', 'Assigned By', and 'Modified By'. The table contains one entry: 'AAO\_Jesse' (Acting Authorized Official) with a role dropdown set to 'Acting Authorized Official' and an active date of '2/6/2017'. Red boxes highlight the search box, the 'SEARCH' button, the 'NEW MEMBER' button, the 'AAO\_Jesse' entry, the role dropdown, and the active date field.

**OR**

If creating a brand new user:

1. Fill in the required profile fields
2. Assign a username and password
3. Assign a role
4. Select **Save & Add to Organization**

The screenshot shows the 'Add/Edit Members' form for the 'Agate Test Org' organization. The form includes the following fields and options:

- Name:** Prefix (dropdown), First (text: Test), Middle (text: New), Last (text: User), Suffix (dropdown). Asterisks are present on the First, Middle, Last, and Suffix fields.
- Title:** Text field containing 'Test AAO Title'.
- Email:** Text field containing 'jking@agatesoftware.com'.
- Username:** Text field containing 'TestAAO'.
- Password:** Text field with masked characters (dots).
- Confirm Password:** Text field with masked characters (dots).
- Date Active:** Text field containing '2/6/2017'.
- Date Inactive:** Text field.
- Role:** Dropdown menu containing 'Acting Authorized Official'.

Navigation links at the top include 'My Home', 'My Applications', 'My Organization(s)', 'My Profile', and 'Logout'. A 'Back' button is located below the navigation. The 'SAVE & ADD TO ORGANIZATION' button is highlighted with a red box, and a 'SHOW HELP' button is also visible.

## Managing Organization Uploads

IGS Connect features an **Organization Uploads** page within your **My Organization(s)** screen that allows each organization to upload various documents of importance, such as tax forms, which may need to be reviewed by IGS staff.

To add organization uploads:

1. From any page, select **My Organization(s)**
2. Select **Organization Uploads**
3. Click **Browse** for each requested upload, then locate and select the relevant file from your available storage drives
4. Select **Save**

My Home My Applications

My Organization(s) My Profile Logout

SAVE SHOW HELP

Back

### Organization - Agate Test Org

Please complete all the required fields below. Required fields are marked with an \*.

[Organization Information](#) | [Organization Members](#) | [Organization Uploads](#)

Organization Information

Name	<input type="text" value="Agate Test Org"/>	*
Short Name	<input type="text" value="Agate Test"/>	*
Federal ID	<input type="text" value="12-3456789"/>	*
DUNS #	<input type="text" value="123456789"/>	*
Address	<input type="text" value="123 Test Street"/>	*
City	<input type="text" value="Okemos"/>	*
State	<input type="text" value="Arkansas"/>	*
Zipcode	<input type="text" value="55555"/>	*
County	<input type="text" value="Crittenden County"/>	*
Phone	<input type="text" value="(555) 555-5555"/>	*
Fax	<input type="text" value="(555) 555-5555"/>	
Email	<input type="text" value="jking@agatesoftware.com"/>	*
Website	<input type="text"/>	

My Home My Applications

My Organization(s) My Profile Logout

SAVE CHECK GLOBAL ERRORS

Back

Document Information: [OD-Agate Test Org-00002](#)

[Details](#)

You are here: > [Organization Details Menu](#) > [Forms Menu](#)

[Organization Information](#) | [Organization Members](#) | [Organization Uploads](#)

### ORGANIZATION UPLOADS

Please upload a completed W-9 tax form for your organization.  
[Click Here](#) to download a W-9 form.

## 6. My Profile

### Updating your user profile

It is important to keep your IGS Connect contact information up-to-date. To update your user profile:

1. From any screen, select **My Profile**
2. Update any necessary fields
3. Select **Save**

My Home | My Applications

My Reports | My Administration | My Training Materials | My Organization(s) | **My Profile** | Logout

**SAVE** SHOW HELP

Back

### My Profile

Please complete all the required fields below. Required fields are marked with an \*.

Contact Information

Name: Prefix [v], First [Test]\*, Middle [ ], Last [AO]\*, Suffix [v]

Display Name [ ]

Organization [Office of Intergovernmental Services]\*

Title [IntelliGrants Admin]

Address [123 Main]\*

City [Little Rock]\*, State [Arkansas]\*, Zipcode [12345]\*

County [Arkansas County]\*

Phone #1 [(555) 555-5555]\*, Phone #2 [ ]

Fax [ ], Cell Phone [ ]

Email [testao@test.com]\*

Website [ ]

Username [TestAO]\*

Password [ ], Confirm Password [ ]\*

### Updating another user's profile

An Authorized Official can update the profile information for Acting Authorized Official users within their organization by following these steps:

1. From any screen, select **My Organization(s)**
2. Select **Organization Members**
3. Select the user for which you would like to update the profile information
4. Update the necessary information
5. Select **Save**



## 7. Navigating, Advancing, and Managing a Document

### Navigating a Document

#### Application Summary

The Application Summary page (also referred to as the **Document Menu**) is the main landing page that you'll be automatically directed to whenever you initiate a new application, or when you select to view an existing application from **My Applications**. It will display information highlights regarding information that is currently filled in on key fields within the document.

The information shown on this page is role-based, meaning Role X could potentially see different information than Role Y; this allows each role to see a quick "snapshot" of information that is pertinent to them, rather than sifting through information that they may not need to know or be aware of.

The information displaying on this page can also change for each role, depending on the current status of the document; this allows for more dynamic and relevant information snapshots for each role.

All document menu navigation techniques will remain consistent throughout any other documents you may have to fill out within IGS Connect, not just applications.

The screenshot displays the IGS Connect user interface. At the top, there are tabs for 'My Home' and 'My Applications'. A navigation bar includes links for 'My Reports', 'My Administration', 'My Training Materials', 'My Organization(s)', 'My Profile', and 'Logout', along with an 'ADD NOTE' button. Below this, a row of icons with labels: 'Menu', 'Forms Menu', 'Status Changes', 'Management Tools', and 'Related Documents and Messages'. A 'Back' button is located below the icons. The main content area is titled 'APPLICATION SUMMARY' and contains the following text:

Below is a summary of the current application information

Organization Name:	Agate Test Org
Authorized Official:	Jesse AO
Project Title:	
Project Type:	Sample Project Type

## Forms Menu

The **Forms Menu** is where the vast majority of the work in an application is completed. This section contains all of the forms that are necessary to complete prior to submitting your application, or otherwise advancing it further into the process flow. To edit application forms, click(or hover your mouse over) the **Forms Menu** button near the top of the screen and then click the name of the form that you wish to complete or edit.

Follow the instructions on each page and fill in the requested content. Click **Save** periodically to save any information entered. Many pages have a **Show Help** button; select it for more information about the page.

The screenshot shows the top navigation bar with the following items: Menu, Forms Menu (highlighted), Status Changes, Management Tools, and Related Documents and Messages. A dropdown menu for 'Forms Menu' is open, listing the following items:

Status	Page Name	Note
Application		
	<a href="#">Authorized Official Contact Information</a>	
	<a href="#">Project Summary</a>	
	<a href="#">Project Narrative</a>	
	<a href="#">Financial Overview</a>	
	<a href="#">Goals and Objectives</a>	
	<a href="#">Employee Detail Form</a>	
	<a href="#">Project Budget &amp; Budget Narrative</a>	

Below the dropdown, a table shows application details:

	Current Status	Period Date / Date Due
(MAIN)	Application in Process	09/13/2016 - 12/31/2017 12/31/2017 11:59PM CST

Below the table, the following information is displayed:

Organization Name: Agate Test Org  
 Authorized Official: Jesse AO  
 Project Title:  
 Project Type: Sample Project Type

### IGS Application FY2018 Menu - Forms

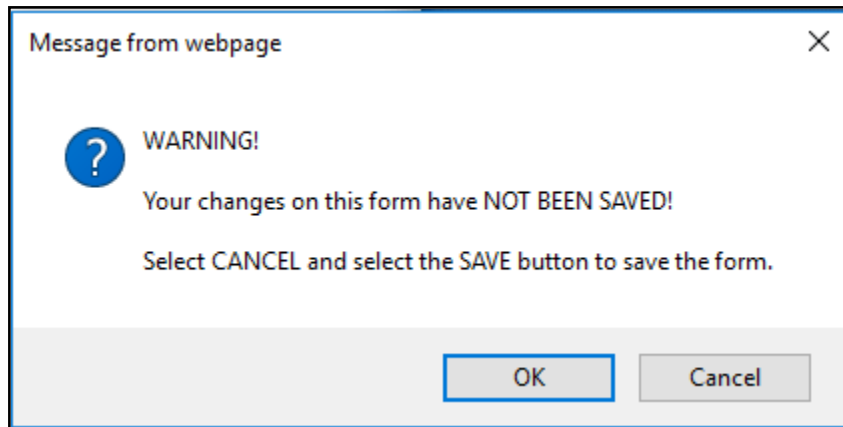
Please complete all required forms below.

Document Information: [IGS-2018-Agate Test Org-00057](#)  
[Details](#)

Forms

Status	Page Name	Note	Created By	Last Modified By
Application				
	<a href="#">Authorized Official Contact Information</a>		Mr. Jesse AO 1/16/2017 10:53:13 AM	Mr. Jesse AO 1/26/2017 8:16:17 PM
	<a href="#">Project Summary</a>			
	<a href="#">Project Narrative</a>			
	<a href="#">Financial Overview</a>			
	<a href="#">Goals and Objectives</a>			
	<a href="#">Employee Detail Form</a>			
	<a href="#">Project Budget &amp; Budget Narrative</a>			
	<a href="#">Modification Document Uploads</a>			

IGS Connect also features a **Page Save Warning**; if any field in a form is changed, a pop-up box will appear if you attempt to leave the page without saving. **Click "OK" to leave the page without saving, click "Cancel" to return to the form and save changes.**



## Status Changes

The **Status Changes** dropdown allows a pre-authorized user (based on role) the ability to submit applications, or otherwise push the application to the next required status in the process flow.

Click(or hover) the **Status Changes** button, located near the top of the screen while inside of any document navigation page, to see which statuses are currently available for your assigned role. If this menu is blank, this means the user account you're currently logged in with does not hold the correct permissions to move the application out of the current status.

Current Status	Period Date / Date Due
Application in Process	09/13/2016 - 12/31/2017 12/31/2017 11:59PM CST

**APPLICATION SUMMARY**

Below is a summary

Organization Name: Agate Test Org  
 Authorized Official: Jesse AO  
 Project Title:  
 Project Type: Sample Project Type

## Access Management Tools

The **Management Tools** dropdown provides various pre-authorized roles access to useful tools that will perform certain management functions relating to the current document, such as assigning new users to the document via the **Add/Edit People** tool, or generating a PDF copy of the entire application that can be downloaded for personal records.

It is located near the top of the screen while inside of any document navigation screen; click(or hover) the **Management Tools** button to display a list of all tools that are available for the role you are currently assigned to on that document.

The screenshot shows the IGS Connect Admin interface. At the top, there are navigation tabs: Menu, Forms Menu, Status Changes, Management Tools (highlighted), and Related Documents and Messages. Below the tabs, there is a 'Back' button and document information for 'IGS-2018-Agate'. A table shows document details, including 'Info', 'Document Type', and 'Orga'. The 'APPLICATION SUMMARY' section is visible, with the text 'Below is a summary of the current ap'. The 'Management Tools' dropdown menu is open, showing three options: 'CREATE FULL PRINT VERSION', 'CREATE FULL BLANK PRINT VERSION', and 'ADD/EDIT PEOPLE'. Each option has a brief description of its function.

Info	Document Type	Orga	Period Date / Date Due
IGS Application FY2018			09/13/2016 - 12/31/2017 12/31/2017 11:59PM CST

**APPLICATION SUMMARY**

Below is a summary of the current ap

Organization Name: Agate Test Org  
 Authorized Official: Jesse AO  
 Project Title:  
 Project Type: Sample Project Type

See below for a brief description of a few of the most commonly used management tools:

**CREATE FULL PRINT VERSION**: This tool will generate a PDF of the entire document with all the field content keyed by someone intact.

**CREATE FULL BLANK PRINT VERSION**: This tool will generate a blank PDF of the entire document, removing only the field content keyed by someone.

**ADD/EDIT PEOPLE**: See the **Managing Assigned Users Within an Application** section for a detailed description of this tool.

**STATUS HISTORY**: This tool will display a full history of the past statuses the document has gone through, along with the name of the user who updated the status, and the date and time that the status update happened - in order from initial status to latest status.

**CHECK FOR ERRORS**: This tool provides a list of page errors that can currently be found throughout the application, and also provides links to those pages, if any are found, for easy navigation and correction. All errors found with this tool must be fixed before the application can be pushed to the next status.

It is recommended to run this tool right before updating the status, in order to help ensure all potential page errors have been caught.

**ATTACHMENT REPOSITORY:** This tool will provide a list of all attached files that can be found throughout all pages within the application you are viewing. These documents are 'attached' to the document via any Upload fields that may be found within the application pages. By selecting the **ZIP** checkbox next to all of the documents that you wish to download, you can pack them together into one .ZIP file for easy file management.

## Managing Assigned Users in an Application

The Authorized Official has administrative rights to add or remove Acting Authorized Officials to and from applications that they have created. With a higher document role comes the ability to add/remove various "lower" roles.

When an organization's Authorized Official or Acting Authorized Official initiates an application for their organization, any user who has either of those roles will automatically be added to the document as an assigned role matching their respective organization role.

Any future IGS Connect users that are added to an organization after documents have already been created for that organization will **not** be automatically added to existing applications. However, any of those new users may be manually added to an existing application throughout the entire application completion process by those of an equal or higher-level role such as an IGS staff member.

## Assigning User Access to an Application

1. To add an Authorized Official or Acting Authorized Official to an application, an Authorized Official who is already assigned to the application should navigate to the appropriate application, either via **My Tasks** on the **My Home** page or by using the **My Applications** search tab at the top of any page.
2. Click the **View Management Tools** button and choose the **Add/Edit People** management tool.
3. In the search criteria box, type the name of the individual you wish to assign to the document and click the **Search** button.
4. From the Search results, select the checkbox next to the user(s) name, give a security role from the provided dropdown field, and fill in the Active Dates for the dates they should be able to access the application. Leave the Inactive date (2<sup>nd</sup> box) blank for open-ended access.
5. Click the **Save** button to add the selected user(s) to the application. The page should re-load and take you back to the list of currently assigned user(s). You should now see the new user(s) in this list, confirming they have been added to the document.

## Remove a User's Access to an Application

There are two ways to remove a user's access to an existing application. To begin, click the **View Management Tools** breadcrumb button and then choose the **Add/Edit People** management tool.

1. Edit the Active start date (1<sup>st</sup> box) and/or End date (2<sup>nd</sup> box) for the user. The user will not be able to access the application before the specified Start date or after the specified End date.

The below screenshot shows one user (Authorized Official role) who was given access to the document starting on 01/13/2017, and has open-ended access (blank Inactive date). The second user (Acting Authorized Official) was given access to the document starting on 01/13/2017 as well, but will be cut off from access to the document after 02/28/2017.

Current People Assigned

<input type="checkbox"/>	Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/>	Mr. Jesse AO <a href="#">Email</a>	Agate Test Org (Authorized Official)	Authorized Official	1/13/2017	Grant System
<input checked="" type="checkbox"/>	Jesse AAO <a href="#">Email</a>	Agate Test Org (Acting Authorized Official)	Acting Authorized Official	1/13/2017 2/28/2017	Grant System

**OR**

2. To remove a user, disable (uncheck) that user and click **Save**.

Current People Assigned

<input type="checkbox"/>	Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/>	Mr. Jesse AO <a href="#">Email</a>	Agate Test Org (Authorized Official)	Authorized Official	1/13/2017	Grant System
<input type="checkbox"/>	Jesse AAO <a href="#">Email</a>	Agate Test Org (Acting Authorized Official)	Acting Authorized Official	1/13/2017 2/28/2017	Grant System

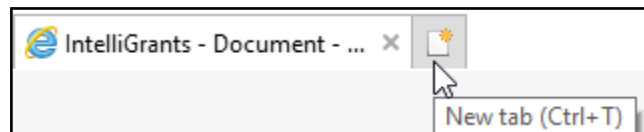
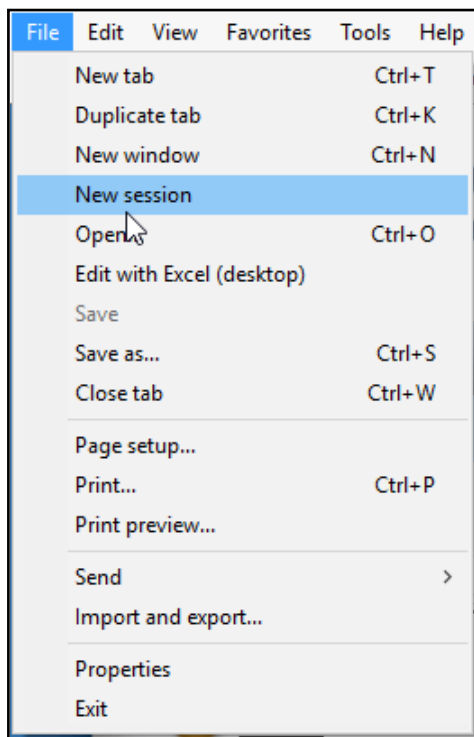
## Filling Out the Application

**Note to user:**

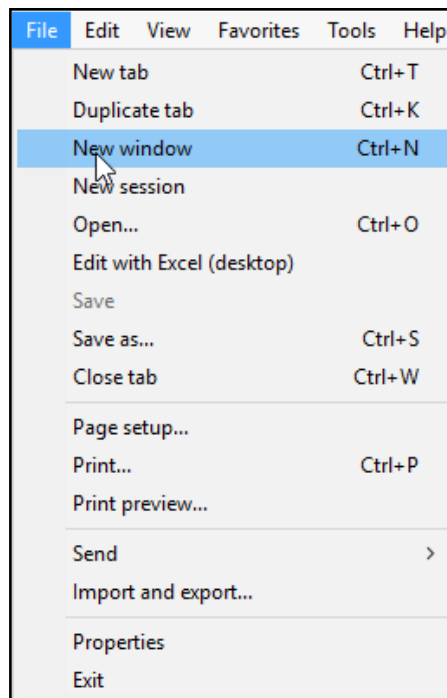
**Do not** open multiple windows or browser tabs that are also connected to IGS Connect while filling out your application, as this can cause issues with browser cookies and result in being kicked off of your original session, as well as potentially losing your work from the original tab or window.

If you need to have multiple windows of IGS Connect active to view and utilize other activities within the system while working, please ensure you are using a separate browser session (a browser session is **not** the same as a new browser window or browser tab).

In Internet Explorer, this can be achieved by navigating to File > New Session. Both Google Chrome and Firefox require third-party browser extension tools in order to manage multiple browser sessions.



**OR**



1. Click (or hover) the **Forms Menu** breadcrumb button, located at the top of any document navigation screen.
2. Select the form you wish you complete. All forms that are required for the current document status will need to be completed before advancing the application; if you do not complete these correctly, you will be given on-screen errors upon saving each page to help guide you. Once you fill a form with all necessary information, click the **Save** button to lock your information to the page.

### Common field types:

*If an unsupported character is entered in any of these fields(i.e: a letter in a number or money textbox), or the formatting for that field is not being recognized, an on-screen prompt will appear to inform you of the required characters and formatting for that box.*

**Help Icon:** This is a help icon that you may see next to a field or a question while filling out your application. Hovering your mouse cursor over this icon will display helpful hints regarding that field or question.



**Checkbox:** This is a standard checkbox used to indicate a selection (or set of selections). It can be checked or unchecked by clicking on the icon.



**Radio Button:** This is a standard radio button, used to indicate a singular selection(typically amongst a group of other options, but can also be alone). It can be selected by clicking the icon, and it can be de-selected by double-clicking the icon or by choosing a different answer within the same group of related options.



**Textbox:** This is a standard text-entry field which accepts all character types. You may also copy and paste text from an external source(such as Microsoft Word) into the textbox.



**Number Textbox:** This is a special textbox which accepts only number values. Some number textboxes will allow decimal values to be entered, while others only accept integers.

**Money Textbox:** This is a special textbox which accepts only money values, and a separating period for cents where required. In most cases, you may enter up to 2 decimal places for cents; however, not all money textboxes will accept decimal (cent) values – only full dollar amounts. Any attempts to enter a decimal money value in a money field that requires full dollar amounts will result in the auto-rounding of the value to the nearest whole number. If you enter an incorrect character type or fail to follow the required format of the field, an on-screen prompt will display to inform you of the required format for that box.

**Percentage Textbox:** This is a special textbox which accepts only percentage values in the form of numbers, either whole or decimal (typically up to 2 decimal places). Operates similarly to that of the money textbox.

 %

**Date Selection Textbox:** This is a special textbox which accepts only a date in MM/DD/YYYY format. When this field has been selected, a popup calendar will typically appear from which a date can be selected, using the Month navigation arrows, and automatically filled in. You may also manually key in(or copy/paste) a date as long as it follows the MM/DD/YYYY format.

March, 2017						
Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: March 3, 2017

**Email Address Textbox:** This is a special textbox which accepts only text in the format of an email address. i.e: [joe@testwebsite.com](mailto:joe@testwebsite.com).

**Zip Code Textbox:** This is a special textbox which accepts only zip codes in the formats of "#####" or "#####-####".

**Phone Number/Fax Number Textbox:** This is a special textbox which accepts only numbers in the format of a phone number. When presented with a block of 7 digits, the field will auto-format the block into a formatted US phone number. You may also manually type the phone number with the correct format.

**Dropdown Selections:** This is a static set of selections from which you may choose one of the available options by clicking the dropdown arrow and the choice you'd like to make.

**Document Upload:** Document Upload fields will allow you to upload a document to the system, which will then be able to be viewed and downloaded by anyone that views the application, including IGS staff. Click "Browse" to find and select the file from your computer. The file will only be saved to the form once the form itself has been saved/re-saved.

To delete a file that has been uploaded, click the **Delete** checkbox and re-save the page.

- *If any sensitive information is visible in your document that should not be visible to IGS staff members, please take necessary precautions to redact the information before uploading.*
- *If you attempt to upload a file, and upon page save the file disappears(is not saved), there may be an issue with file type compatibility. Please contact your program manager to report the issue.*

Browse...  DELETE  
5564-ATestDocument.txt

**Checkbox:** This is a standard checkbox, which will be used to indicate a single selection or a set of selections. It can be checked or unchecked by clicking on the icon.



3. Select the **View Global Errors** button on any form to see any errors or incomplete pages detectable by the system for that application.

4. To advance the application, click(or hover) the **Status Changes** button, located near the top of your screen while on any of the document navigation screens, and select the **Apply Status** button under the relevant status name.

The screenshot shows a navigation bar with three items: 'Status Changes', 'Management Tools', and 'Related Documents and Messages'. The 'Status Changes' item is highlighted with a mouse cursor. A dropdown menu is open under 'Status Changes', titled 'Status Changes'. It contains two sections: 'Possible Statuses' and 'Current Status'. Under 'Possible Statuses', there are two entries: 'APPLICATION SUBMITTED' and 'APPLICATION CANCELLED', each with an 'APPLY STATUS' button below it. The 'Current Status' section on the right shows 'Application in Process'.

You may also encounter on-screen errors when attempting to advance an application's status; this happens when all page requirements are not met.

The error will provide you with a hyperlink to the page(s) in question, for easy navigation and correction. When you believe you are finished fixing the remaining page errors, simply repeat **Step 4**.

**If you experience any issues that cannot be remedied by reviewing this manual, please contact IGS for further assistance.**